Right Person. Right Seat.

A guide to getting the right people on the bus.

Overview

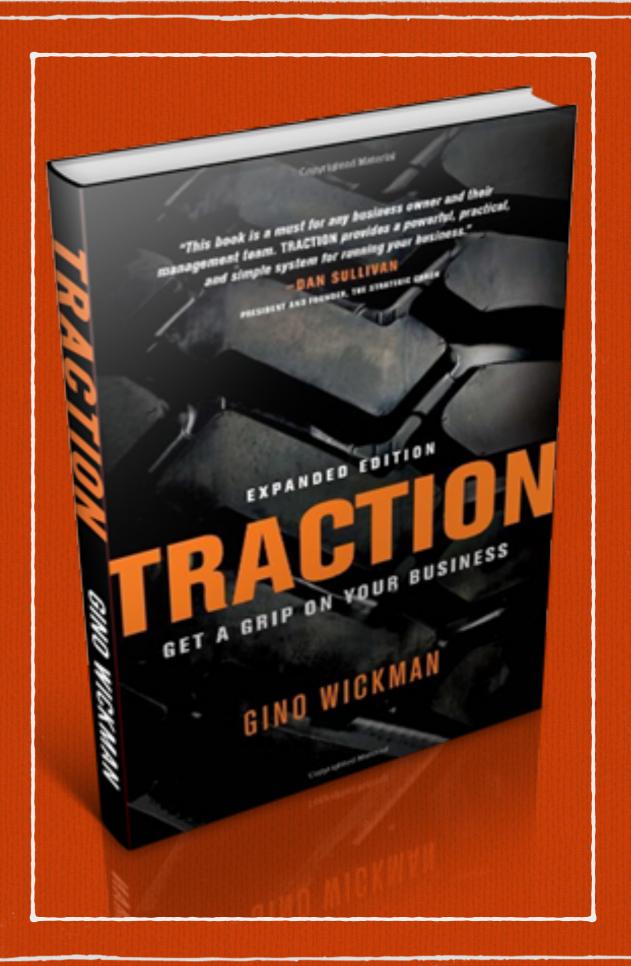
- ☐ Traction/EOS
- □ Core Values
- ☐ Accountability Chart
- ☐ Get It. Want It. Capacity to Do It.
- □ Delegate and Elevate
- □ 5-5-5

The 4 People Issues

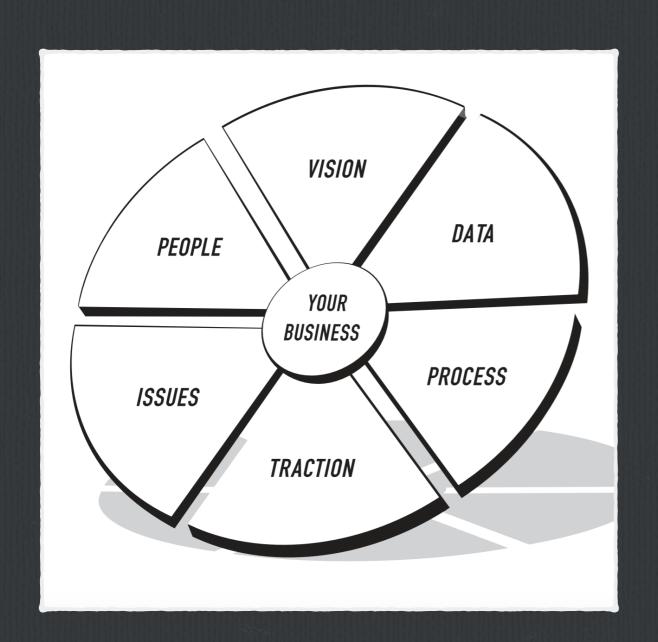
- ☐ Right person. Right seat.
- ☐ Right person. Wrong seat.
- □ Wrong person. Right seat.
- □ Wrong person. Wrong seat.

Traction

Gino Wickman



Traction Process



- □ Vision
- □ Data
- □ Process
- □ Traction
- ☐ Issues
- □ People

Hungry for Achievement Enthusiastic, Energetic, Tenacious, and Competitive Accountable Service the Customer Above All Else Work Hard Never Satisfied Continuous Self-Improvement

Help First Exhibit Professionalism Encourage Individual Initiative Growth Oriented Treat Everyone with Respect Have Creativity, Dreams, and Imagination **No Cynicism**

Humbly Confident Fanatical Attention to Consistency and Detail Exhibit Loyalty and Commitment Understand the Value of Reputation Fun ☐ Fair **Encourage Teamwork**

Creative Cakes' Core Values



- ☐ Make the Next Person Successful
- ☐ Go the Extra Mile
- ☐ Generate Positive Energy
- ☐ Act with Reputation in Mind

Accountability Chart

It's not an Org Chart!

THE ACCOUNTABILITY CHART

<u>Visionary</u>

- 20 Ideas
- · Creativity/Problem Solving
- · Big Relationships
- Culture
- R&D
- · More on Emotion

Integrator

- Lead, Manage,
- Accountability (LMA)
- P&L/Business PlanRemove Obstacles &
- Remove Obstacles 8 Barriers
- Special Projects
- Core Processes
- More on Logic

Sales/Mktg

- LMA
- Sales/revenue goal
- Selling
- Marketing
- Sales & Marketing Process

Operations

- LMA
- · Customer Service
- Process Management
- Making the Product
- · Providing the Service

<u>Finance</u>

- LMAAR/AP
- Budgeting
- Reporting
- HR/Admin
- Office Management



preneurial Operating System®

Accountability Chart

- □ Clarifies Roles and Responsibilities
- □ 5 Tasks main responsibilities
- \square Boxes are about the seat, not the person

VISIONARY New Ideas / R & D · Creative Problem Solving · Major External Relationships · Company Culture Creative Cakes Bakery & Café Selling Big Deals **ACCOUNTABILITY CHART** Beth Fahey INTEGRATOR LMA Profit & Loss / Business Plan Remove Obstacles & Barriers · Special Project Management Support Culture Beth Fahey SALES & MARKETING **OPERATIONS FINANCE** LMA LMA LMA · Sales Process · Process Management A/P & A/R Customer Service · Production & Delivery · Budgeting Selling · Customer Satisfaction Reporting Marketing · Budget/Purchase Reg./Inventory · HR Compliance Budget/Revenue I.T. Beth Fahey Becky Palermo · Cost Analysis Fran Leon Marketing Cake Consultant Sales Baker A.M. Baker P.M. Cook Cake Consultant Cake Decorator Cook Brand Awareness Revenue \$ · LMA Product Costing Inventory Market/Product Selling Training Inventory Inventory Revenue \$ Scheduling/Labor \$ Purchase Reg. Purchasing Research · Baking/Product Baking/Product Fulfillment Create training · Cust. Retention Merchandising Deco Quality Production Production Marketing resources Fulfillment Prep Selling Social media. Control Prep Plan/Process Photo mgmt Opening Equipment Maint. Recipe Doc. Customer Satisfaction Closing supervision Deliveries Customer Marketing Budget Scheduling/Labor \$ Scheduling/Labor \$ supervision Price Satisfaction Training Training Sean Hurst Quotes/Consult Purchase req. FOH Waste Waste Michelle Rohm Training Andrew Choinacki Alfredo Young Beth Fahev Waste Matt Carlson Carole Delejewski Bonnie Witowski Ashley Spitzer Graphic Designer Cake Decorator Prep Cook - PT Cashier Cashier Asst. Baker A.M. Dishwashing and Cashier Brand Awareness Customer Service Deco Cakes Customer Service Physical Inventory Production Cleaning Customer Service Produce Marketing Order Fulfillment Price Order Fulfillment Loading Ovens Order Fulfillment Cleaning Checklist Materials Quotes/Consult Stock and · Customer Service Stock and Wrapping Cakes Organization of Stock and Merchandise Call Brides Filling /Icing Party Merchandise Small wares Products Products Products Cakes Laundry Maint, Cleanliness Maint, Cleanliness Maint, Cleanliness Prep for Head Aireen Arelleano Basic Cake Orders Basic Cake Orders Basic Cake Orders Amanda Himes Bobbie G TBD Jennifer McDaniel Ellen Cullen Tiffany Garza Vicky Leonard

SALES & MARKETING

- LMA
- Sales Process
- Customer Service
- Selling
- Marketing
- Budget/Revenue

Beth Fahey

Marketing

- Brand Awareness
- Market/Product Research
- Marketing Plan/Process
- Marketing Budget

Beth Fahey

Sales

- LMA
- Training
- Merchandising
- Selling
- Opening supervision

Michelle Rohm

Cake Consultant

- LMA
- Revenue \$
- Cust. Retention
- · Social media.
- · Closing supervision
- Selling
- Purchase req. FOH

Bonnie Witowski

Cake Consultant

- Revenue \$
- Selling
- Create training resources
- Photo mgmt

Sean Hurst

Graphic Designer

- Brand Awareness
- Produce Marketing Materials

Aireen Arelleano

Cashier

- Customer Service
- Order Fulfillment
- Stock and Merchandise Products
- Maint. Cleanliness
- Basic Cake Orders

Jennifer McDaniel

Cashier

- Customer Service
- Order Fulfillment
- Stock and Merchandise Products
- Maint. Cleanliness
- Basic Cake Orders

Ellen Cullen

Cashier

- Customer Service
- Order Fulfillment
- Stock and Merchandise Products
- Maint. Cleanliness
- Basic Cake Orders

Vicky Leonard

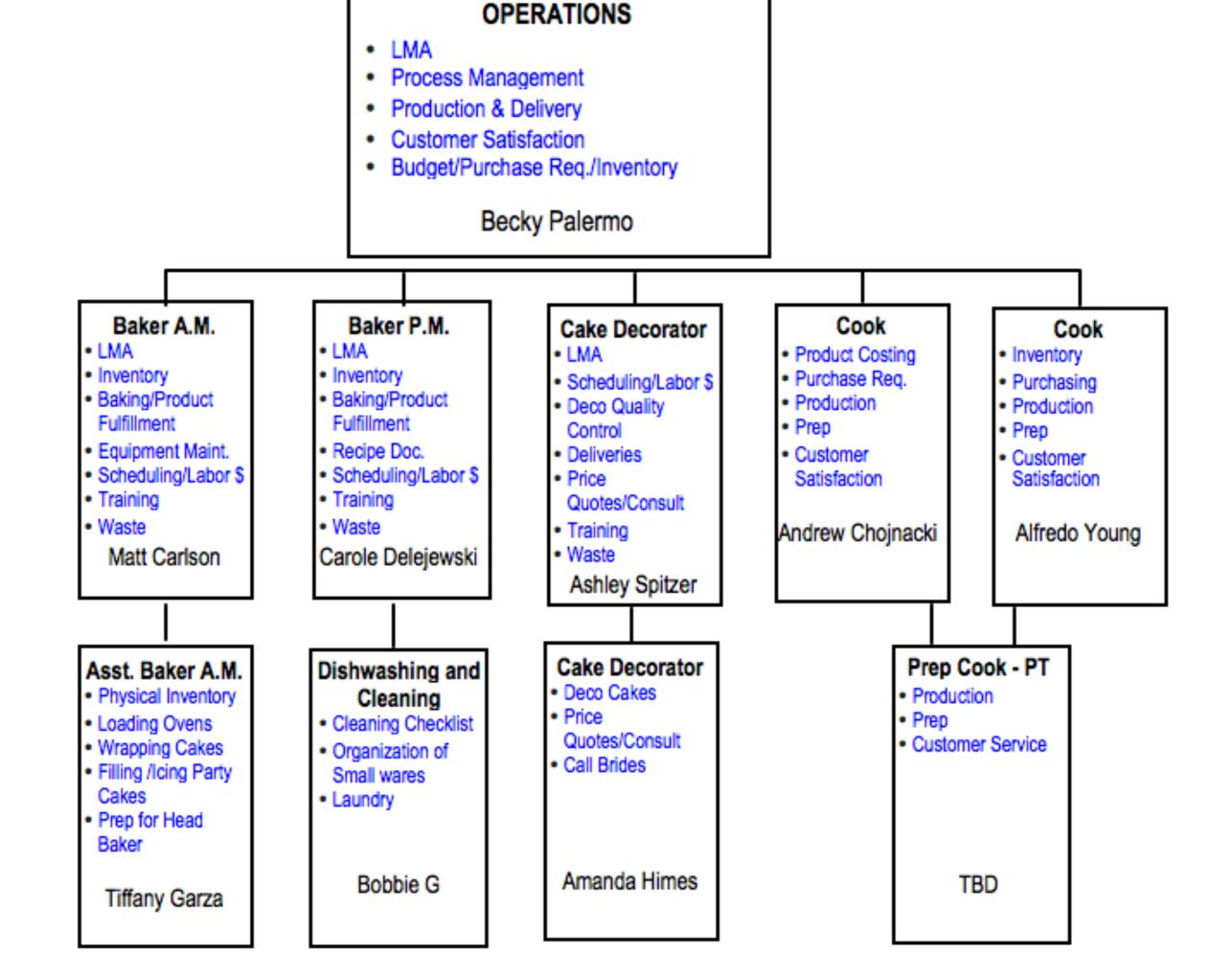
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- Filling Cake
- Prep Bake

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FINANCE

- LMA
- A/P & A/R
- Budgeting
- Reporting
- HR Compliance
- I.T.
- Cost Analysis

Fran Leon

Get It. Want It. Capacity to Do It.

"Yes" on all.



Gets It.

- □ Neurons connect?
- ☐ Understands the ins and outs of the position.
- □ Not everyone gets it.

Wants It.

- ☐ Genuinely wants to do the job.
- ☐ Has to want to do it on their own.
- □ Capacity ≠ Want

Capacity to Do It.

- Possesses the mental, physical, spiritual, knowledge, and emotional capacity to do the job.
- ☐ Can you wait?

The People Analyzer

When in doubt, pull it out.

THE PEOPLE ANALYZER™

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Toolbox

THE PEOPLE ANALYZER™

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THE PEOPLE ANALYZER™

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The Bar

THE PEOPLE ANALYZER™ **NAME** Jennifer Bill Enrique Molly Mary Phil **The Bar**

- ☐ Setting the bar
- \square Exceptions to the rule
- ☐ Communicating expectations

Who is a core values fit?

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- ☐ Must be a "yes" on all 3
- \square Exceptions to the rule

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☐ Is Jennifer in the right seat?

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☐ Is Bill in the right seat?

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Delegate and Elevate

Be honest!

DELEGATE AND ELEVATE™

Love/Great	Like/Good
Big picture planning	marketing/Sales
Fixing big problems Writing blog	Payroll Financial digging
Learning	Computer stuff
New Ideas / R+D	Photography
Networking Sales Process	- Andrews - Andr
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Don't Like/Good	Don't Like/Not Good
	Scheduling
Budgeting Training Staff Social media	
Budgeting Training Staff	Scheduling
Budgeting Training Staff Social media L.M.A.	Scheduling
Budgeting Training Staff Social media	Scheduling
Budgeting Training Staff Social media L.M.A. Planning rewards specials Website updates	Scheduling
Budgeting Training Staff Social media L.M.A. Planning rewards specials	Scheduling
Budgeting Training Staff Social media L.M.A. Planning rewards specials Website updates Customer Satisfaction	Scheduling



Why Delegate and Elevate?

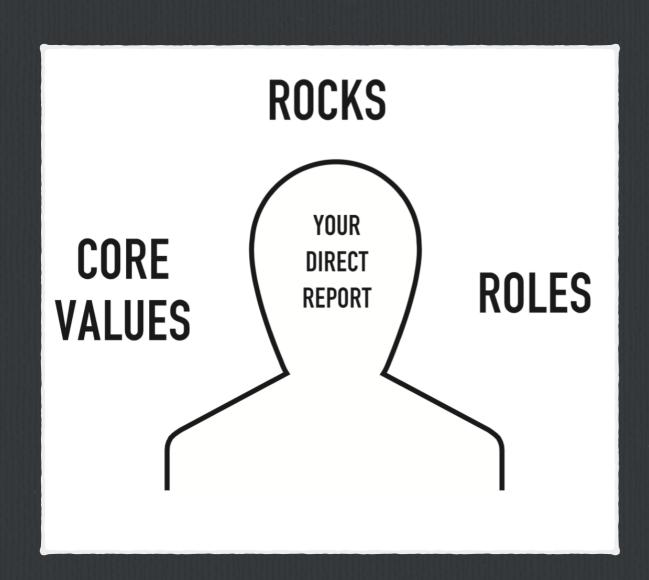
- ☐ Allows you to "let go of the vine"
- □ Clarifies the best use of your time
- ☐ Identify RP/RS issues
- ☐ Goal: work in quadrant one

The Quarterly Conversation

5-5-5



5-5-5 Structure



- ☐ 5 core values
- ☐ 5 rocks
- ☐ 5 accountabilities

A Quarterly Conversation IS

- □ Casual
- ☐ A conversation what's working/not working?
- ☐ Off site
- □ Structured
- Scheduled

A Quarterly Conversation IS NOT

- □ A formal review
- ☐ A place for "telling"
- ☐ Hours long

Recap

- □ Traction/EOS
- □ Core Values
- □ Accountability Chart
- ☐ Get It. Want It. Capacity to Do It.
- □ Delegate and Elevate
- □ 5-5-5

Questions

Beth Fahey

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